



# Financial Adviser Profile

## Overview

Mark Egan (CPA, SSA, CFP) is a Sub-Authorised Representative of Plan Act Grow Financial Pty Ltd trading as PAG Financial Services, Corporate Authorised Representative No. 1265602. Authorised Representative No. 239746. Mark has been in the financial services industry for over 20 years.

## Qualifications

Mark Egan is a Certified Financial Planner (CFP) and Self-Managed Superannuation Fund Specialist Advisor (SSA). Mark holds a Bachelor of Business in Accounting and meets the competency requirements under ASIC's Regulatory Guide RG 146.

## Professional Memberships

Mark Egan is a member of the Australian Society of Certified Practising Accountants (CPAs), the SMSF Association and the Financial Planning Association; and abides by their codes of professional conduct and ethics.

## Authorisations

Mark Egan is authorised to provide advice and deal in the following financial products:

- Life Products including Investment Life Insurance Products & Life Risk Insurance Products;
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services;
- Deposit & Payment Products;
- Retirement Savings Accounts ("RSA") products;
- Debentures, Stocks or Bonds issued or proposed to be issued by a Government;
- Superannuation;
- Self-Managed Superannuation Funds; and
- Securities



**Mark Egan**

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## PAG Financial Advice Fees and Charges

Mark Egan will be paid by Financial Planning Advice Fees as described in the Financial Services Guide. The amount of the benefit and how it is calculated will be advised to you during your initial meeting.

Mark Egan's hourly rate for Financial Services is \$275 incl. GST and you will be notified of the time involved prior to the commencement of any work if applicable.

PAG Financial provide the option of ongoing reporting and advisory services. This fee is a fixed fee and will be determined by the level of service required. You will be notified of the cost involved prior to the commencement of any ongoing services.

PAG Financial pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Mark Egan is a director of PAG Financial and will receive a salary/benefit from this company.

## Other Benefits Mark May Receive

From time to time Mark may be invited to social or sporting events and receive the occasional gift such as a bottle of wine or hamper on special occasions. These non-cash benefits will have a value of less than \$300. A register listing the details of any non-cash benefits between \$100 and \$300 is maintained. These invitations and gifts do not influence the advice provided to you. If you would like more information you can request a copy of the register.